



User Manual
October 2004

The NOS MOA Tracking System was developed by
Luis Oms
in conjunction with
Zhen Zhang

This document is about a dynamic system. The files, layouts, fields, reports, functions and features are all subject to ongoing modification and therefore may not match the contents of this static document. Any questions or comments can be directed to:

Cheryl Marlin
301-713-1156 x 218
NOSAdministrativeApplications@noaa.gov

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1.0 Background

1.1 What is the NOS MOA Tracking System?

The National Ocean Service (NOS) is involved in numerous agreements to form partnerships and work with other federal agencies, universities, state and local governments, tribes and international governments, private institutions and other organizations. The process of initiating, extending or modifying these agreements involves a long chain of clearance of the official Memorandum of Agreement (MOA) and required supporting documentation. Approval and clearance signatures are obtained during a controlled routing of the MOA package through the involved Program Office, NOS senior management, National Oceanic and Atmospheric Administration (NOAA) General Counsel, and if required, the Office of the Executive Secretary, and Department of Commerce (DOC) General Counsel.

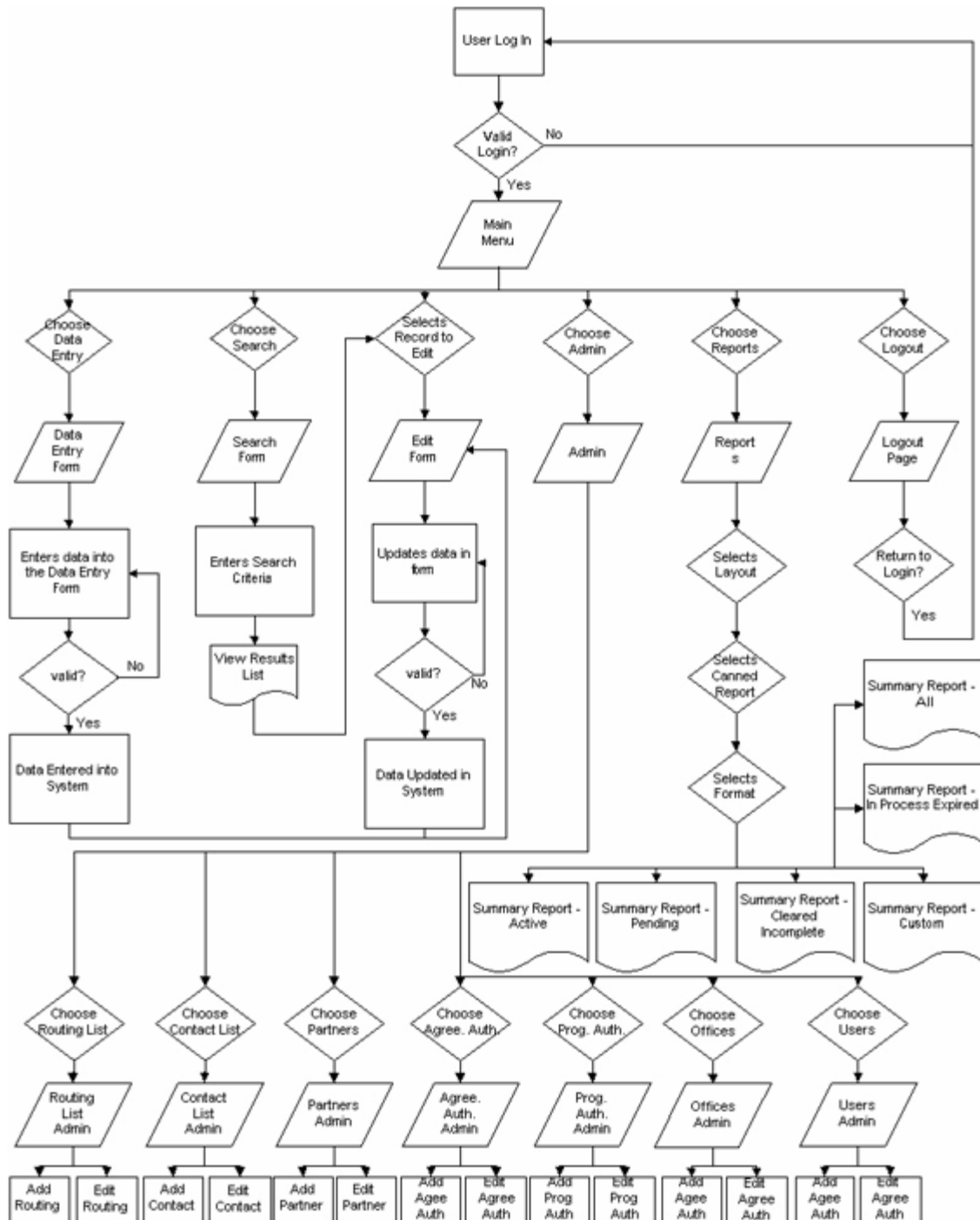
NOS uses a computer-based management information system to track and report on Memorandum of Agreement. The NOS MOA Tracking System was developed:

- To enable management to have quick access to consistent and accurate information on NOS agreements,
- To help track the MOA routing process and identify associated points of contact,
- To provide a common structure and format for collecting information on NOS' agreements,
- To help obtain all required signatures and supporting information to ensure valid agreements,
- To track the status of agreements that are in the chain of clearance,
- To compile a list of ongoing agreements,
- To assist in identifying agreements that have expired or are due to expire,
- To assist in the day-to-day administration of agreements,
- To summarize legal and programmatic authorities for engaging in agreed upon activities and for transfer of funds,
- To summarize incoming and outgoing funding associated with the agreements, and
- To prepare reports required by NOS, NOAA, and DOC officials.

The NOS Office of Management and Budget (MB) had been using the original MOA Tracking System at the NOS and Program Office level for several years. As needs changed, so must the system. Therefore these changes have been implemented in the system:

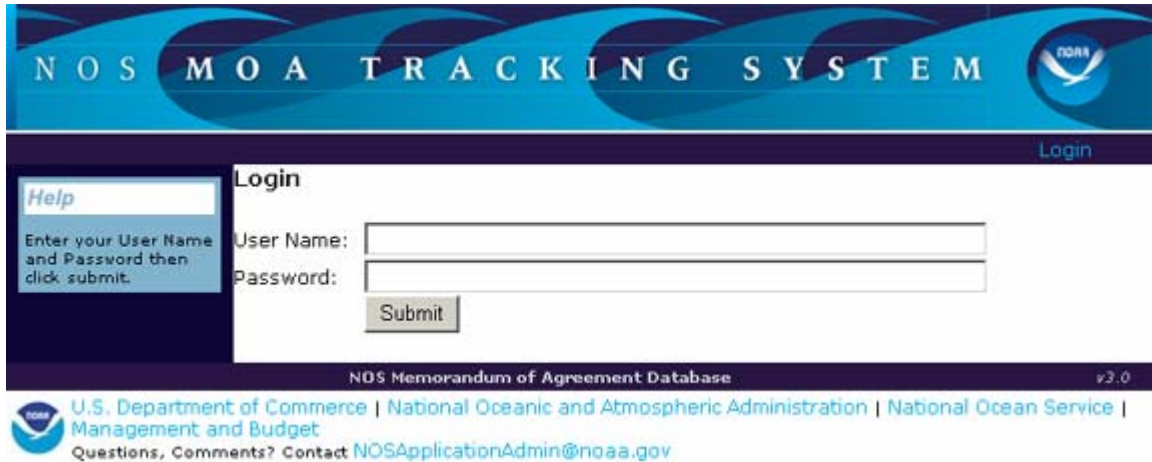
- Taking the NOS MOA Tracking system to the Intranet for use in a larger scale, and supporting more users.
- Standardizing of Partners
- Allow for the storage of Electronic Documents in the database to comply with COOP requirements.
- Satisfaction of Section 508 Requirements.
- Satisfaction of Security Requirements.

1.2 Application Flow Diagram



2.0 Using The Application

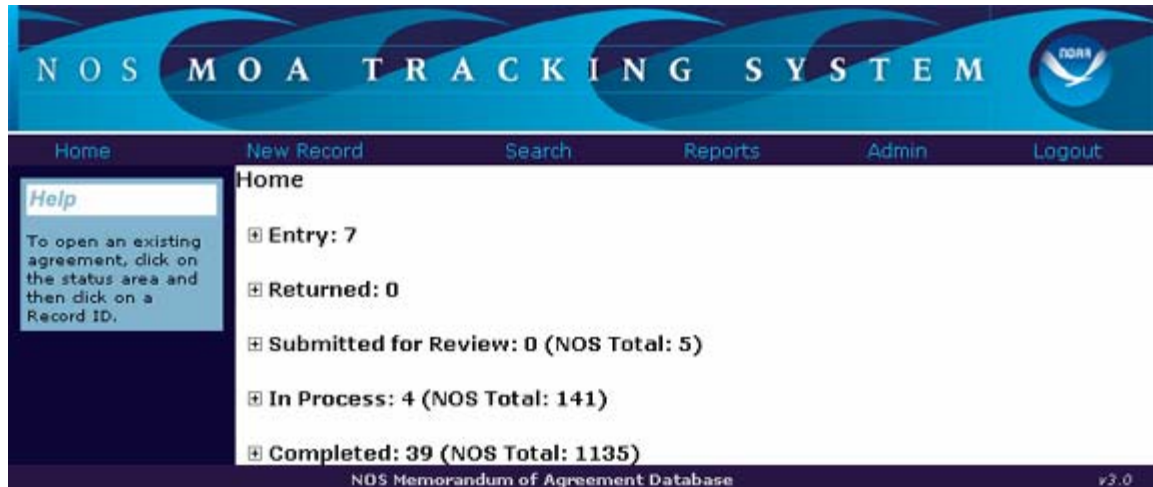
2.1 Login



The screenshot shows the login interface for the NOS MOA Tracking System. At the top, a blue banner contains the text "NOS MOA TRACKING SYSTEM" and a NOAA logo. Below the banner, a dark blue bar features a "Login" link. The main content area has a "Help" box on the left with instructions: "Enter your User Name and Password then click submit." To the right, under the heading "Login", are two input fields labeled "User Name:" and "Password:", followed by a "Submit" button. The footer includes the text "NOS Memorandum of Agreement Database v3.0" and a NOAA logo. Below the logo, it lists "U.S. Department of Commerce | National Oceanic and Atmospheric Administration | National Ocean Service | Management and Budget" and provides a contact email: "Questions, Comments? Contact: NOSApplicationAdmin@noaa.gov".

The login page is very simple. To login, just simply enter your **User Name** and **Password** into the appropriate boxes and click **Submit**. If your credentials are accepted, then you will be allowed in. Otherwise you will see a notice *Login Failed!*, at which point you can try to login again. If you continue to have problems, please contact your administrator.

2.2 Main/Home



The Main or Home page is the starting point of the NOS MOA Tracking System. From here you can bring up details about current agreements your office is working on:

- **Entry** – Records still in the Program Office level for initial Data Entry.
- **Returned** – Records that have been returned from NOS to the program office requiring further attention.
- **Submitted for Review** – Records submitted to the NOS MOA Liason for their review.
- **In Process** – Records currently being worked on in NOS Senior Management.
- **Completed** – Records that all required documents have been submitted.

Note: The first number next to each item is the number your office has in that status level. The number inside the parenthesis is the total number of records in the database that fit in that status level.

Or by using the Menu Bar, you can navigate to another part of the database.

- **Home** – Displays a list of the records in the database that belong to your office. (Current page)
- **New Record** – Brings up a blank form where you can select what type of agreement you're about to create.
- **Search** – A form for searching the database for records by keywords.
- **Reports** – Select from various Summary and Count reports.
- **Admin** – Administer Routing Lists, Contacts, Partners, Agreement Authorities, Programmatic Authorities, Offices, and Users.
- **Logout** - Logout of the application.

2.3 Creating a New Agreement

The New Agreement page allows you to setup a new record. Select from the drop down list the **Type of Record** you wish to create. You can choose from:

- **Agreement**
- **Amendment**
- **Annex**
- **Modification**
- **ISA/SA**
- **Revision**
- **Task Order**
- **Work Order**
- **Legacy Agreement**

If you choose Agreement, all you have to do is hit continue. If you choose Legacy Agreement, you must then enter the **Legacy Agreement Code**. When you hit continue, a check will be performed to make sure this new agreement doesn't already exist. If it does, you will receive a warning **This Legacy Agreement Already Exists**. If you choose any of the other choices, you will then have to select the **Original Agreement Code** from the drop down list, and then enter the **Sequence Number**. Sequence numbers must be 3 characters long. To finish entering agreement information, see Editing Agreements.

2.4 Editing Agreements

NOS MOA TRACKING SYSTEM

Home New Agreement Search Reports Admin Logout

Data Entry Modification date: 7/26/2004 10:41 AM
NGS-2643 Modified By: Luis Oms

Print NGS Control Sheet PDF
 Print NOS Control Sheet PDF

Help

Sections with a ● are complete, while those with a ● do not meet the requirements.

● Denotes Required Fields

General Information:
 If not an Agreement, select Original Agreement Code and enter a Sequence Number.

Partners:
 There must be at least one NOAA partner.

For amendments and annexes, only enter additional or reduced (use negative sign) funding amount(s).

Codes & Authorities:
 For waivers, include in the supporting documentation a description of waiver, reason for waiver, justification, and basis of justification.

General Information ●

Partners ●

Codes & Authorities ●

Contacts & Routing ●

Documents

NOS Memorandum of Agreement Database v3.0

Upon entering an Agreement's Data Entry page, you will see 5 or 6 major categories:

- **General Information** – Includes Type of Record, Title, Period of Performance, Multi-Year Status, and Notes can all be found here.
- **Partners** – Includes Participating Organizations, and Estimated Budget Information.
- **Codes & Authorities** – Includes Other Party Code, Agreement Authority, Programmatic Authorities, and Waivers.
- **Contacts & Routing** – Includes Project Officer, Budget Officer, and Routing Information.
- **Documents** – Includes Electronic versions of documents associated with the record.
- **NOS (Not Pictured)** – Includes NOS Routing List, NOAA GC Info, ES Info, NOAA Control Number, DOC/OGC Info, Date Approval Memo Signed, and NOS Status Notes.

Note: Some things that are common to all areas of Data Entry:

- ● – Symbol that required data is missing in that section.
- ● – Symbol that all required data has been filled in that section.

- **Print [Office] Control Sheet** – Prints a copy of the Office Control Sheet for this record in the format selected.
- **Print NOS Control Sheet** – Prints a copy of the NOS Control Sheet for this record in the format selected.
- **Office-ID** – Displays the Office that owns the record and the Record ID assigned by the Database.
- **Modification Info** – Displays the last time the record was modified, and who did the last modification.
- **Drop Down Lists** – Most lists here are managed by the Administrators. Should you need something added, contact the MOA Liaison or Database Administrator with your request, and the change can be made in short order.

General Information

The General Information area stores basic information about this record. Specific data stored here is:

- **Project Title / Subject** – Required information describing what the document is for.
- **Period of Performance** – Required information showing the the start and end dates. If either or both are unknown, select a checkbox and the dates will be entered later by the NOS MOA Liaison.
- **Multi-Year Status** – Yes/No if the record spans multiple years.
- **Notes** – place to capture any notes about the document

The screenshot shows the 'General Information' section of a web form. At the top, there is a red header bar with the text 'General Information'. Below this, the form is divided into several sections. The first section, 'Type of record: Amendment', contains three lines of text: 'Original Agreement Code MOA-2004-196', 'Sequence Number: 001', and 'Underlying Agreements: MOA-2004-196'. The second section, 'Project Title / Subject', features a large text input field. The third section, 'Period of Performance', includes two date pickers labeled 'Start / Effective Date' and 'End / Expiration Date'. Below these are three checkboxes: 'This agreement becomes effective when signed by all parties.', 'the duration of this agreement is indefinite.', and 'This period of performance is an extension to the original agreement.'. The fourth section, 'This is a multi-year agreement:', has a checkbox. The fifth section, 'Notes', contains a large text input field. At the bottom of the form is a 'Save' button.

Partners

The Partners section stores all info about the partners, as well as the estimated budget numbers. Specific data stored here is:

Data Entry
MOA-2003-123
NOS-26-86

Modification date: 8/5/2004 10:47 AM
Modified By:

[Print NOS Control Sheet](#) PDF
[Print NOS Control Sheet](#) PDF

General Information

Partners

Participating organizations (include the NOS Partner)

Type	Name
Add	Apurture / Museum Seattle Aquarium
Delete	Foreign Govt Republic of Korea

Estimated budget information for each partner to the agreement for each fiscal year

This agreement is unfunded: ☐

Name	FY	Total Project Budget	Receivable	Payable
Add	Republic of Korea	2000	\$	\$
Delete	Republic of Korea	2000	\$	\$
Totals			\$0,000	\$0,000

Save

- **Partners** – All the partners to the agreement, categorized by type. Select the type of partner, then select the partner name and click Add. To delete a partner, simply click Delete next to the desired name, and it will be removed.

Note: You must add the NOS/NOAA partner here as well.

- **Document is Unfunded** – Yes/No checkbox storing wheather or not the Agreement is funded. Checked means it is not funded.
- **Document Funding Estimates** – The estimated budget information for this document. Select the Partner from the drop down list, enter which Fiscal Year, and then the budget information into the appropriate column and click Add.

To delete an item, simply click Delete next to the desired item, and it will be removed.

Codes & Authorities

Here you select the codes that apply to this document. Specific data stored here is:

- **Other Party Code / Number** – The Code used by other partners for their internal tracking
- **Agreement Authority** – Select the documents Agreement Authority from the drop down list. If Economy Act is chosen, please provide the D&F Status, and if it was signed, please provide the date.
- **Programmatic Authority(ies)** – Select the Programmatic Authority from the list and click add. Repeat until all applicable Authorities are entered. To delete an item, simply click Delete next to the desired item, and it will be removed.
- **Waivers** – Yes/NO checkbox storing wheather or not there are waivers. If checked, please provide a copy of the waivers with the agreement.

Data Entry
MOA-2003-123
NOS-26-86

Modification date: 8/5/2004 10:47 AM
Modified By:

[Print NOS Control Sheet](#) PDF
[Print NOS Control Sheet](#) PDF

General Information

Partners

Codes & Authorities

Other Party Agreement Code / Number :

Agreement / transfer / acceptance Authority:
(15 USC 154)

If Economy act:
D&F Status: Pending
D&F Date Signed: (mm/dd/yyyy)

Programmatic Authority(ies)

Authority
Add
Delete
15 USC 1152
16 USC 651 to 656
33 U.S.C. 603a and 603b

There are waivers granted with this Agreement: ☐

Save

Contacts & Routing

Here we capture the contacts information, and set up the routing list for sending this document around the office for signatures. Specific data stored here is:

Data Entry
MOA-2003-123
NOS-2646

Modification date: 8/5/2004 10:47 AM
Modified by: [User]
[Print NOS Control Sheet] [PDF]

General Information
Partners
Codes & Authorities
Contacts & Routing

Contact Information:

Project Officer/Technical POC: [Text Box]
Telephone #: [Text Box]
NOS Budget Officer/Administrative POC: [Text Box]
Telephone #: [Text Box]

Routing Information: [Copy from Template](#)

Order	Position	Name	Action	Date
10	Project Officer	Renee Swends	Review & Clear	
50	Program Official (Deputy or Director)	Charles Chulstrom	Review & Clear	
50	Administrative Staff	Lucy Hall	Log & Forward	
50	NOS MOA Liaison	Erin Johnson	Log & Forward	
100	Program Official (Deputy or Director)	Charles Chulstrom	Review, Sign, & Clear	
110	Administrative Staff	Lucy Hall	Log & Forward to NOS MOA Liaison	

[Add] [Edit] [Delete]

- **Project Officer** – Tracks the Project Officer for this document. Select the name from the drop down list, and the phone number will appear beneath it. Should you need to adjust this list, you can do that under the Admin area.
- **NOS Budget Officer** – Tracks the NOS Budget Officer for this document. Select the name from the drop down list, and the phone number will appear beneath it. Should you need to adjust this list, you can do that under the Admin area.
- **Routing Information** – Used for internal tracking of the document. You can copy your default template as a starting point by clicking the Copy From Template link. You can then adjust the order or names in the list, or just simply start from scratch and click Add. Click Edit by the name you

wish to edit, and you can change the information for just this one record. To delete an item, simply click Delete next to the desired item, and it will be removed.

Documents

Here you can upload Draft Documents, Fully Executed Documents, or virtually anything else that has to do with this document. Simply select the what file you'll be uploading, enter a name, choose the format, and then select the location of the file (click browse to navigate to that folder through the GUI interface), then just click add, and your document is now uploaded to the server. To review a document already on there, click on Open next to the name of the document.

Note: If you are an administrator, you can click Delete to remove a document from the database, to help manage the amount of file storage.

General Information
Partners
Codes & Authorities
Contacts & Routing
Documents

Attachment Documents

File	Description	Format	Location
Add Attachments / Exhibits		DOC	Browse...
File	Description	Format	Date

NOS

Used for tracking the In Process actions by the NOS MOA Liason. Users can see where the document is in the signature process, find out which official has received the document, what the NOAA Control Number is, and any notes entered by the NOS MOA Liason. Specific data stored here is:

☒ General Information
 ☒ Partners
 ☒ Codes & Authorities
 ☒ Contacts & Routing
 ☒ Documents
 ☐ NOS

NOS Routing Information: [Copy From Template](#)

	Order <small>(N/A 203)</small>	Office <small>(N/A R/NB)</small>	Name <small>(N/A Name 204)</small>
Self			
	Order	Office	Name
			Date

NOAA GC Info:
 GC Office:

Name & Phone #:
(N/A Name 205 & 205-111-1111-123)

Dates Sent & Cleaned:
(N/A 6/2/2003)

ES Info:
 Name & Phone #:
(N/A Name 206 & 206-111-1111-123)

Dates Sent & Cleaned:
(N/A 6/2/2003)

NOAA Control / Folder ID Number:

DOC/O&C Info:
 Name & Phone #:
(N/A Name 207 & 207-111-1111-123)

Dates Sent & Cleaned:
(N/A 6/2/2003)

Date Approval Memo Signed by NOS:
(N/A 6/2/2003)

Date Received Signed Copies:
(N/A 6/2/2003)

NOS Status Notes:

- **NOS Routing Information** - Used for NOS Senior Management tracking of the document. You can insert a copy of your default template as a starting point by clicking the Copy From Template link. You can then adjust the order or names in the list, or just simply start from scratch and click Add. Click Edit by the name you wish to edit, and you can change the information for just this one record. To delete an item, simply click Delete next to the desired item, and it will be removed.
- **NOAA GC Info** – Tracks which GC Office, and contact info of that person, as well as the date sent and date received. Simply select which GC Office from the drop down list, and then enter the necessary information.
- **ES Info** – Tracks the ES Contact Info, as well as the date sent and date received. Simply enter the necessary information.
- **NOAA Control Number** – Text holding the Control Number assigned to this document.
- **DOC/OGC Info** – Tracks the ES Contact Info, as well as the date sent and date received. Simply enter the necessary information.
- **Date Approval Memo Signed** –

Date that the Approval Memo was signed.

- **Date Received Signed Copies** – Date that all signed copies were received by the NOS MOA Liason.
- **NOS Status Notes** – Detailed notes about the tracking of the document though the NOS Routing Process.

2.5 Searching Agreements

Help

Enter a keyword or phrase and click Search.

Click on Details to view more information on any of the listed agreements.

Search

MOA-2004

Records Found: 55

	Office-ID	NOS Agreement Code	Subject	Effective Dates
Details	ONMS-1092	MOA-2004-001	\$Coffins Patch 1733 Archaeological Site Collection	- 9/30/2008
Details	ONMS-1095	MOA-2004-004	\$Outline the duties of the Parties for the Portland Symposium and to arrange for use of NOAA and NMS	10/24/2003-11/9/2003
Details	NGS-1100	MOA-2004-009	\$Geodetic Advisor Program in the State of Hawaii	- 9/30/2008
			\$Development of Reef Fish	

This is a keyword search page. Simply enter in any word or string you wish to search the database for and click Search. The results will display in a Grid. Above the grid you'll see the number of records matching the search criteria. Inside the Grid, you'll see the Record ID, Agreement Code, Subject, and the Effective Dates as entered into the database. Clicking on Details will open up the Data Entry page for that record.

Note: Items not belonging to your office, or not of your security level, will not be editable but can come up in search results.

2.6 Reports

Home New Record Search Reports Admin Logout

Help
Choose a Layout, then choose a Canned Report, and finally choose your Format and click Go.

Reports
Summary Report Active MB PDF
Go <Select Format> PDF DOC

MB Summary Report of Active Records

Office ID MB-402
NOS Agreement Code MOA-2000-402
Subject Parties are charged with developing a partnership to operate collaboratively the Marine Environmental Health Research Laboratory (MEHRL), located at the South Carolina Marine Resources Center, Charleston, South Carolina.

Name	Phone	Date Sent To	Date Cleared
QC QGC Tom Aldridge	202-482-2138	06/14/2000	07/06/2000
ES Partner			

The reports page allows you to print or save reports from a set of pre-defined queries. To get a report:

First, you must choose a Layout:

- **Summary Report** – Displays summary data of records specified by criteria.
- **Count Report** – Calculates counts of records by specified criteria.

If you select Summary Report you are presented with the following options for Canned Report:

- **All** – All the agreements in the database. Can then select an office.
- **Active** – Where the start date of the document is before today, and the end date of the agreement is after today. Can then select an office.
- **Expires in 6 Months** – Where the end date of the document is less than or equal to 6 months from today. Can then select an office.
- **Pending** – Where the expiration date of the document is marked as Pending in the MOA Tracking System. Can then select an office.
- **Cleared Incomplete** – The document has an Approval Memo signed, but has not been marked as complete. Can then select an office.
- **In-Process Expired** – The document has not been marked as Complete, but the end date has passed. Can then select an office.
- **Custom** – Can be customized to your request. Just contact the Database Administrator for a custom query.

If you select Count Report, you get the following options for Canned Report:

- **By Office** – A count of all the records in the database, for each office.
- **By Agreement Authority** – A count of all the records in the database, by each Agreement Authority.
- **By Programmatic Authority** – A count of all the records in the database, by each Programmatic Authority.

Once those are selected, you must choose a format:

- **PDF** – This is an Adobe Portable Document Format. Requires that Adobe Acrobat Reader be installed.
- **DOC** – Microsoft's Word format, requires that you have Microsoft Word installed.

2.7 Administration



The Administration page is designed to help you manage settings in the database. This page is dependent upon your level of clearance. Office users can only manage two of the seven sections, while the administrators can manage all 7. The sections are:

Office and Administrator level

- **Routing List Template** – Manages the routing list for your office. Administrators will manage the NOS Routing list.
- **Contacts List** – Will manage the contacts list for your office.

Administrator Level

- **Partners** – Manage the lists of Partners, and which Category they are in.
- **Agreement Authorities** – Manage the list of Agreement Authorities that users can select from.
- **Programmatic Authorities** – Manage the list of Programmatic Authorities that users can select from.
- **Offices** – Manage the Offices users are assigned to.
- **Users** – Manage the list of the application users.

Each section has the same capabilities. These capabilities are:

- **Adding a New Item** – Just fill out the required information and click Add.
- **Editing an Item** – Click edit to change to Edit mode. Adjust the data you wish to edit. Click Update to submit the changes, or click Cancel to revert back.
- **Deleting / Locking an Item** – Go to Edit mode by clicking Edit by the name. Check the Delete / Lock checkbox to Delete / Lock the item. Click Update to submit, or click Cancel to revert back. Uncheck the checkbox to Undelete / Unlock.

2.8 Logout



To logout from the system, simply click **Logout** in the Menu Bar and you will exit from the system. For the best security you should close your browser also.

Note: For security purposes if you are inactive on the browser for more than 20 minutes, you will automatically be logged out. If you did not hit **Save** before the system logged you out, you may lose the last changes made to the record.